


## Frequently Asked Questions about: the Payment Roster

### How do I identify students who are new to my school's roster?

To identify students new to your roster is a two-part process that must be completed prior to the time a new roster is produced. The following steps will allow you to flag all of the records currently on your roster so that the next time it runs, you will be able to create a list of students who have been added.

#### Part 1 – Display Roster

- 1: Open the CSAC Standard Roster in the Display Roster screen.
- 2: Locate the box labeled “**Update all records with custom code**”   
(Will display in Custom Code 5 field)”
- 3: Select a two-character code to use. We have been using OR as our training example (on roster) and enter the code in the box. Codes must alpha or numeric.
- 4: Click on the Submit button

#### Part 2 – Customize Roster

- 1: Go to the Customize Roster menu
- 2: Click on the edit button next to the CSAC Standard Roster
- 3: Name the roster. We have been using the name “New to Roster,” and click the button to indicate that this is NOT your preferred format.
- 4: Go to the last section of the page and select “exclude” in the drop down box next to Custom Code 5 and then enter the two-character code you chose in Step 3.
- 5: Save the Roster format

This completes the process. After the roster is updated at the end of the week, go back to the Display Roster screen and select the New to Roster format on the blue bar. The resulting list will be the students who were not on your roster when you flagged all the records. You will want to repeat Part 1, steps 3 and 4 after processing the changes. This system will allow you to see who has been added to your roster over a period of time. It is not necessary to do this process each week unless you need to know the exact date the student's first appeared on the roster.

### What is the purpose of the Custom Codes?

Custom codes allow schools to create special identifiers that can be used to filter the records on the roster. A few of the possible uses are to:

- Flag accounts that require research or special handling
- Suppress the records for students that are not attending the school
- Identify the staff member responsible for working a particular set of students
- Mark records that have been reconciled

### Do I have to use custom codes or customized rosters?

No, they are there as a tool for schools that wish to change the way that the payment data is viewed or to sort and/or filter the types of records that are displayed,